

PROFESSIONAL FORUM



A Tool for Commanders The Integrated Training Task Matrix

MAJOR JOHN M. SPISZER

The planning, preparation, and execution of training is a constant concern of Army leaders. Many of the problems are in the management of training at battalion level and below, chiefly due to the poor application of doctrine at company level and poor training preparation.

The Integrated Training Task Matrix is a tool for use at company level and below to help plan, prepare, and assess training. Its use fully incorporates the principles and doctrine in Field Manuals

(FMs) 25-100, *Training the Force*, and 25-101, *Battle Focused Training*.

I was first introduced to this tool as a company commander in 1990 when FM 25-101 was being distributed to the field. My brigade commander, Brigadier General David H. Ohle, had adopted the matrix from a tool used in the 75th Ranger Regiment and then modified it during his tour as assistant division commander for maneuver, 1st Infantry Division. Now the Deputy Commandant of the Command

and General Staff College, General Ohle recommends the matrix to students in the CGSC and the Pre-Command Course. My objective here is to present the methods, uses, and benefits of the matrix as a training management tool.

At company level and below, using this matrix assists in the identification, preparation, and integration of the tasks to be taught at all levels during training. It helps focus the unit on critical training tasks instead of training events. At any given time, in accordance with the FM 25-101 planning cycle, the commander has seven matrices in use or development; each represents a week of training—the week just completed and six weeks ahead. The matrices are excellent tools for company training meetings and also as briefing aids during battalion training meetings and quarterly training briefings (QTBs) to the brigade commander (if he requires them from his company commanders). It is also useful in a commander's quarterly training guidance (one matrix per month, to provide initial focus), and as the basis of training assessment.

To make this tool work the commander must fully ground himself in FMs 25-100 and 101 and the unit's appropriate ARTEP

INTEGRATED TRAINING TASKS

____ WEEKS OUT WEEK ____

COLLECTIVE TASKS	LEADER TASKS	INDIVIDUAL TASKS	DRILLS
DURING GREEN/AMBER CYCLE	DURING COLLECTIVE TNG	DURING COLLECTIVE TNG	DURING COLLECTIVE TNG
FUTURE TASKS WK	PRIOR TO COLLECTIVE TNG	PRIOR TO COLLECTIVE TNG	PRIOR TO COLLECTIVE TNG
	RETRAINING	RETRAINING	RETRAINING

SERGEANTS' TIME

(Army Training and Evaluation Program) manuals and mission training plans (MTPs), especially to aid in task integration, at least until the fielding of the new Standard Army Training System (SATS), which promises to help the user with this process.

Filling out seven matrices may seem like a lot of work, but, once incorporated into the unit's current FM 25-101-based training management system, it saves time by better focusing the unit's training needs and efforts.

The following is a step-by-step run-down on how to fill out the matrix. This is a technique the user may modify to meet his own needs and the unit's unique requirements. Use of this tool can also result in numerous modifications and improvements as the user becomes more familiar with its benefits to training management and execution. The matrix has many purposes, and this example only provides a starting point.

In space 1, the commander notes the week of training (Week 0 is the week just completed, Week 1 is the coming week, and so on.). All entries should be made in pencil so that changes can be made as the training plan matures. Conducting company training meetings each Friday results in six matrices of future training and one for the week of training just completed. The commander prepares for his training meeting by putting together the initial draft of Week 6 and changing the numbers on the existing matrices. As Week 6 training approaches, each matrix takes shape through training meeting input.

Space 2 is the fiscal year training week—the first week in October is Week 1 and so on—which ties the matrix to the training week on the company's training schedules.

In Block 3, the commander lists the collective tasks on which his unit will train this week. This block should be used only during a training (green) or mission (amber) cycle, except as a reference tool. Training in the support (red) cycle is generally limited to individual or leader task training in preparation for collective training during mission or training cycles. For reference, the commander annotates the collective task in block 7 (future tasks)

for which supporting individual or leader training is being conducted during a support cycle week. This helps integrate and focus the unit's training.

Identify tasks selected for training by using the FM 25-101 training management cycle. Annotate the task name straight out of the corresponding ARTEP or MTP manual. Although including the task number from the ARTEP manual is also helpful, it may be redundant if it is on the unit's training schedule. (My training schedules were based on these matrices and corresponding training meeting notes.) List only the critical tasks for the week. Try to stick to the METL, battle, or other supporting tasks that need to be emphasized (those that have been assessed as "untrained"). Listing every task a platoon may perform during training may result in a loss of focus. For instance, performing the mission *Defend*

Try to stick to the METL, battle, or other supporting tasks that need to be emphasized (those that have been assessed as "untrained").

may incorporate seven or more collective tasks, but list only the tasks currently assessed as untrained or deficient, or tasks that are critical to the training. For a defense lane training event, the training assessment—conducted with the company's leaders—might identify the collective tasks of *Construct obstacles* and *Defend* from ARTEP 7-8 MTP for inclusion on the matrix. The remaining tasks do not appear on the matrix but are addressed in the events training plan. The focus of resources, evaluation, and so on, is on the tasks identified on the matrix.

This is an iterative group process. The tasks for training are driven from the top (METLs, higher headquarters training guidance) and, more important, from the bottom (unit leaders and evaluators identify the areas that require additional training). Modify and update these matrices at each training meeting using the input received from unit leaders during the company training meetings.

The leader tasks during collective train-

ing are those that are critical to the accomplishment of the collective tasks identified for training during this week. Usually, block 4 shows only one or two of the most critical leader tasks for each collective task. For instance, for the task *Construct obstacles*, the critical leader task might be *Direct installation/removal of a hasty protective minefield*, which is noted on the matrix. In addition, the leader tasks identified here and in blocks 8 and 11 can form the basis for the unit's officer and NCO professional development programs and leader opportunity training.

In block 5, the individual tasks during collective training are the same as block 4 for leader tasks. In the *Construct obstacles* example, this could include the individual tasks of *Employ field expedient early warning devices* or *Install/remove M16A1 antipersonnel mine*. In addition, the assessment of tasks identified is reflected in this block, as well as in blocks 9 and 12, in the NCO Leader Books. The matrix reflects only the most important tasks, as in the Leader Books (in accordance with Training Circular 25-30). The matrix and the Leader Books complement each other.

Block 6 (drills during collective training) is the same as block 5, but this example probably does not include any drills (in accordance with ARTEP 7-8 MTP Battle Drill-to-Collective Task matrix). It might if you designed the training plan or scenario to include reacting to contact or indirect fire (from ARTEP 7-8-Drill) during obstacle emplacement (and if your unit needs training on the task).

For these first four blocks—and the next two sets of blocks—horizontally aligning the tasks with each other across the blocks helps signify their integration. Other useful techniques include highlighting tasks assessed as untrained, underlining CTT (Common Task Training) or EIB (Expert Infantryman Badge) tasks as these events approach, annotating the METL task supported or the training event on the matrix (at the company level these are probably readily apparent), and adding a "resources required" column.

Block 7, Future Tasks, and the next three blocks are more difficult to under-

INTEGRATED TRAINING TASKS

____ WEEKS OUT (1)

WEEK ____ (2)

COLLECTIVE TASKS	LEADER TASKS	INDIVIDUAL TASKS	DRILLS
<u>DURING GREEN/AMBER CYCLE</u>	<u>DURING COLLECTIVE TNG</u>	<u>DURING COLLECTIVE TNG</u>	<u>DURING COLLECTIVE TNG</u>
(3)	(4)	(5)	(6)
<u>FUTURE TASKS</u> WK	<u>PRIOR TO COLLECTIVE TNG</u>	<u>PRIOR TO COLLECTIVE TNG</u>	<u>PRIOR TO COLLECTIVE TNG</u>
(7)	(8)	(9)	(10)
	<u>RETRAINING</u>	<u>RETRAINING</u>	<u>RETRAINING</u>
	(11)	(12)	(13)

SERGEANTS' TIME
(14)

stand. This is training conducted that week in preparation for other—possibly higher level, more integrated, usually collective—training planned for execution in the future.

In this block, annotate the critical collective tasks you will train on this week, or train only the supporting individual or leader tasks identified with that collective task, which prepares you for future training (see discussion on Block 3). Training individual and leader tasks associated with the task *Construct obstacles* or training on that collective task in this week could be preparation for the task *Defend* to be done in two weeks time during an upcoming training cycle or external evaluation. Or, the task may be *Defend*, on which you plan only walk/crawl training this week to prepare your unit for the future training. Next to the preparatory collective task, note the training week (from block 2) of the corresponding future matrix when the final collective task training is scheduled.

Blocks 8, 9, and 10 are completed using the same discussion as on Blocks 4, 5, and 6, but, again, these tasks are the

individual, leader, drill tasks trained to prepare for a future collective training event or task in support of an identified collective task.

Identify the tasks and drills for retraining, and complete blocks 11, 12, and 13 during company training meetings. They are blank on the Week 6 matrix, at least until the start of the company training meeting at which you introduce the Week 6 matrix. Tasks that go into these blocks include identified leader, individual, and drill tasks that the unit has not performed to standard during Week 0 training, or previous Week 0 training.

There is no retraining block for collective tasks, because the retraining on critical collective tasks should be scheduled and completed during the week of execution. Training is conducted to standard when it is performed; that is, the immediate retraining is done during the week of execution and—in accordance with FM 25-101—retraining time is allocated in the training plan or schedule.

No critical collective task should require retraining; sustainment training falls into the upper blocks as a scheduled

event. At the completion of a successful training event, however, certain supporting individual, leader, and drill tasks may be assessed “need practice” or “untrained.” Identify these weaknesses during unit after-action reviews and company leaders discuss them as requiring retraining during the review of the just-completed Week 0 training in the company training meeting. Then review these tasks to see if they are already scheduled for future training; if not, add them to these blocks during the week of training that they best support the training already planned.

Block 14, which includes blocks 9, 10, 12, and 13, makes up what the Army commonly refers to as Sergeants’ Time. Non-commissioned officers are responsible for training the individual and low-level collective tasks or drills (squad level). NCOs are also responsible for conducting training before a future collective event or as retraining. Identifying these four blocks as Sergeants’ Time gives battle focus to a program that traditionally becomes unprepared hip-pocket training, CTT, inspections, counseling, or wasted time.

This designation of specific tasks for

Sergeants' Time, during company training meetings (and subsequently reflected on training schedules), ensures three results: The NCOs are notified of tasks they must train ahead of time so they can adequately plan and prepare to conduct the training; training accomplished by the NCOs is battle focused and based on tasks identified as critical to support the unit's METL and battle tasks; and tasks requiring more work receive the proper focus and are retrained to standard.

Again, these blocks complement the Leader Book and should contain tasks that the sergeants have identified and are tracking in these books. Inclusion in the matrix emphasizes their upcoming assessment and the subsequent update of the Leader Book. This should assist in the bottom-up feedback (already prepared for review in Leader Books) that occurs in the company and platoon training meetings. In addition, these blocks provide the basis for opportunity training that is separate from scheduled Sergeants' Time. Unscheduled training opportunities now have identified tasks requiring training and preparation.

Filling in the blanks on the matrices is just a drill; what is important is the way the matrices are used. This tool can also be used for several different purposes and different audiences:

Company Training Meetings. The primary purpose of the matrices is to augment and provide focus to the company training meetings. The first major part of the meeting is to review the past week's training. Use the Week 0 matrix as a guide for unit review or assessment. Instead of focusing on an event, the discussion focuses on the tasks performed during the event; this helps in the assessment process of determining whether a task was trained (T), needs practice (P), or is untrained (U). A review of training not conducted during Week 0 can result in an examination of future matrices to see where best to make it up through examining the integration of future training. Put missed training back in where it fits best, based on the plan already in hand (tasks to be performed on the matrices). Deal with tasks that require retraining in the same fashion.

Examine matrices for future weeks si-

multaneously with that section of the training meeting notes (notes per FM 25-101, no modification is necessary since the matrices augment and don't supplant previous guidance). Again, the focus is on tasks rather than events. One drawback is that the matrices tend to generate more in-depth discussions of the unit's training assessment and needs instead of reviewing upcoming events and resource requirements. These discussions make it tougher to meet a one-hour standard, but the results are worth the extra time.

Another major benefit is that proper task integration is built into the training plan. In addition, preparation for training (*Future Task* blocks) is incorporated into training plans and schedules so that the unit is better prepared to conduct major collective training in the green cycle. The critical preparatory steps of training leaders and individuals are emphasized, discussed, and planned.

Quarterly Training Briefs. Although not required at brigade level by current doctrine, company commander QTBs to brigade commanders are becoming more frequent. In the 1st Brigade, 25th Infan-

No critical collective task should require retraining; sustainment training falls into the upper blocks as a scheduled event. Again, the focus is on tasks rather than events.

try Division, all company commanders briefed their training plans for the upcoming quarter in a modified QTB format. The principal briefing slides are training calendars and matrices. Since the QTB (ideally) is six to eight weeks before the quarter, matrices are in rough form. Only one matrix is prepared for each month (unless the unit is in a training cycle period), and the calendar and matrix are shown side by side. Commanders discuss the training event and the collective and leader tasks that pertain to it; the first sergeant discusses the individual and drill tasks. The slide immediately preceding the calendars and matrices is the company METL assessment by platoon. Using this technique, the brigade commander can

tell at a glance whether the planned training is in accordance with the METL and his guidance.

The preparation of these matrices for the brigade QTB provides the rough draft for the weekly matrices used in the company training meetings. Furthermore, the QTB requires the commander and the unit leaders to plan training over a longer term. The short-range training plan cannot be ignored at company level; it must focus on the unit's METL, assessment, and training tasks, not just events. In addition, a unit's professional development program for the quarter falls right out of the leader task blocks briefed at the QTB, ensuring that these programs keep the battle focus on upcoming critical training tasks.

Company Quarterly Training Guidance. Again, quarterly training guidance is not required by doctrine, but some company commanders do issue it. Major contents may include the unit training assessment, priorities for the next quarter, training calendars, training preparation suspenses and requirements, and the QTB matrices, either in draft or final.

The QTB matrices provide the answers to soldiers' questions on what the unit will do during training before the publication of the training schedule. They also augment the training calendars and provide direction and focus for the unit as it conducts business, which helps keep the unit on a steadier path.

Evaluation Plan. The matrices are ready-made as a basis for the training evaluation plan. By going through the steps in determining the critical tasks the unit needs to train to standard, you highlight the tasks on which you want your observer-controllers (OCs) to focus. This gives them the details of what is important to your unit, instead of having them worry about a huge stack of pages copied from the MTP. Although the tasks on the matrix for that week are probably not everything you want evaluated, they are the most important things.

Furthermore, in the absence of a formal evaluation plan (such as Sergeants' Time) the matrix serves as informal evaluation guidance to unit leaders and notice of the minimum updating requirements for Leader Books. The matrices desig-

nate tasks on which you expect input during company training meetings. There is no reason a platoon leader or platoon sergeant cannot discuss his platoon's training status on tasks performed that week. If the task is on the matrix, feedback on the results of training is expected during the training meeting.

Platoon Training. Platoon leaders can also use the matrix format for planning and conducting their training as well as the platoon training meetings. If the time available allows the platoon leaders to completely plan and conduct their own training, provide guidance and resources and let them develop a plan with their subordinate leaders.

This plan is backbriefed to the commander, the executive officer, and the first sergeant on the basis of the platoon's proposed training schedule and matrix. Use of the matrix in a backbrief allows a cross-check to ensure that tasks are properly integrated and that the focus of the training is based on the commander's experience and assessment of his platoons. Also, a platoon leader's matrices and training schedule provide enough detail for inclusion in company training schedules so that they accurately reflect what will occur and when. Training schedules can then inform soldiers of what is really going to happen, not just "platoon training."

In addition, when something disrupts the planned training, it is useful to determine available resources, provide guidance, and adjust training by allowing the platoon leaders, if they are properly trained to do so, to develop a new or modified plan using the matrix technique. This gives the junior leaders, those most familiar with their unit's needs, an opportunity to come up with training that fits. The backbrief, with the proposed schedule and matrix, ensures that training plans do not become some sort of adventure training (the kind platoon leaders often want to do) that is not a genuine unit training requirement.

The real benefit is not in allowing the platoons to plan their own training and alleviate some of the commander's burden (although this can be especially useful when disaster strikes on a Friday before scheduled training), but in developing the junior leaders. Using the matrix

demands that the platoon leaders and NCOs thoroughly understand how to plan and prepare for training—how to integrate tasks, conduct preparatory training, and identify what to evaluate and how to assess their training. This use of the matrices is one of the most beneficial means because it is a ready made tool for teaching junior leaders how to train and how to conduct training management, planning, and preparation. This tool also helps the unit plan, prepare, and conduct op-

This tool also helps the unit plan, prepare, and conduct opportunity training; establish, maintain, and use Leader Books; and prepare the unit's professional development programs.

portunity training; establish, maintain, and use Leader Books; and prepare the unit's professional development programs.

It has proved highly beneficial to many company commanders and is fully consistent with training doctrine as put forth in FMs 25-100 and 25-101. The matrix and the process involved in its preparation help maintain the link between QTBs; short-range and near-term training plans; conducting training meetings; preparing training schedules; and preparing, executing, and evaluating training.

The use of these matrices assists in the development of training that is consistent with the Army's Principles of Training. In fact, it directly relates to the following principles:

Train as you will fight. The matrices allow the commander to develop an initial training plan. The tasks selected outline the training scenario and are based on the unit's METL and training assessment. Training scenarios or lane training events are developed to ensure consistency with the tasks that most need to be trained.

Use appropriate doctrine. The use of this tool is based on doctrine. It helps the commander plan, prepare, execute, and assess his training. It requires a thorough understanding of task integration,

performance-oriented training, sustainment training, and multiechelon training techniques. Leaders must understand how to use and apply their unit's ARTEP and other training-related manuals.

Use performance-oriented training. Tasks are identified early to the unit's leaders, which allows for the dissemination of tasks, conditions, and standards. This technique helps ensure that training is focused on tasks instead of events, and that it is performed to standards instead of time.

Train to sustain proficiency. The matrices help focus the unit on METL tasks, including the supporting individual and drill tasks during Sergeants' Time. Planning for preparatory training and retraining on tasks is not forgotten.

Train using multiechelon techniques. This is one of the greatest benefits of this technique. Proper task integration by the unit leaders; the identification of the related collective, leader, individual, and drill tasks; the conduct of appropriate preparatory training; and the execution of the training with the simultaneous focus on the four echelons of tasks are greatly enhanced by this technique. The task is not just to construct obstacles but also to emplace mines, react to indirect fire (if in the training scenario), and supervise minefield emplacement.

The integration of tasks in the planning and preparation phases of training assures multiechelon execution, which helps make the best use of scarce resources and best sustain unit proficiency.

The Integrated Training Task Matrix can help the commander turn training doctrine into effective training. Once firmly established as a routine planning tool, it becomes easier to use, faster, and more effective. Then leaders can spend more time on the preparation and execution of the training itself. The result is a better trained, more combat-ready unit.

Major John M. Spiszer used this technique as a company commander in the 3d Battalion, 22d Infantry, 25th Infantry Division, where he also served as assistant battalion S-3 and assistant brigade S-3. He is a 1984 graduate of the United States Military Academy and holds a master's degree from Central Michigan University.
